

UNIVERSAL RULES AND MODEL FORMS OF SUSTAINABLE USE AND RE-USE OF RUINED HISTORICAL SITES

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PREAMBLE

A lack of functionality of historical ruined sites leaves limited opportunities for establishing a viable economic future of these sites. Reuse is surely one of the best ways to ensure the preservation of an antique object: a function-free monument deteriorates rapidly, while keeping one ineffective remains alive. Nowadays many heritage places have been adapted for new uses, providing them with a function that guarantees their continuing maintenance and relevance to society. The re-use of a building through a compatible use allows the functional recovery of the monument. Restoration to active use of historical ruined sites may be the most viable way to ensure their continued existence.

The Venice Charter (1964) elaborated the conservation concept, underlining the need to have an active conservation, understood as monument integration with the social life and its dynamics of change, stating: **“The conservation of monuments is always facilitated by making use of them for some socially useful purpose”**.

The UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage (1972), states that each State Party must commit itself **“To ensure that effective and active measures are taken for the protection, conservation and presentation of the cultural and natural heritage situated on its territory, each State Party to this Convention shall endeavor, in so far as possible, and as appropriate for each country: (a) to adopt a general policy which aims to give the cultural and natural heritage a function in the life of the community and to integrate the protection of that heritage into comprehensive planning programmes [...]**.

The Italian Restoration Charter (1972) states that **“In order to ensure the survival of monuments, the possibility of new uses of ancient monumental buildings should also be examined, when these are not incompatible with historical and artistic interests**. Adaptation shall be limited to a minimum, preserving the external forms scrupulously and avoiding sensitive alterations to the type designation, to the building organism and to the sequence of internal paths”.

The Declaration of Amsterdam (1975) definitively states that conserve means to interact with the new functions in a compatible way with the premises: **“it has been proved that historic buildings can be given new functions which correspond to the needs of contemporary life”**.

The Convention for the Protection of the Architectural Heritage of Europe (1985) states that **“Due regard being had to the architectural and historical character of the heritage, each Party undertakes to foster the use of protected properties in the light of the needs of contemporary life and the adaptation when appropriate of old buildings for new uses”**.

The purpose of this Document is therefore to define the basic principles of the project of sustainable use and re-use of historical ruined sites as essential components of heritage conservation efforts.



DEFINITIONS

For the purposes of the present Document,

CONSERVATION refers to all measures and actions aimed at safeguarding tangible cultural heritage while ensuring its accessibility to present and future generations. Conservation embraces preventive conservation, remedial conservation and restoration. All measures and actions should respect the significance and the physical properties of the cultural heritage item. (ICOM-CC, 2008)

CULTURAL HERITAGE SITE refers to a place, locality, natural landscape, settlement area, architectural complex, archaeological site, or standing structure that is recognized and often legally protected as a place of historical and cultural significance. (ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites, ICOMOS, 2008)

MANTAINANCE refers to routine work regularly necessary to keep the fabric of a place in good order. (Conservation Principles, English Heritage, 2008)

MANAGEMENT PLAN refers to a tool which determines and establishes the appropriate strategy, objectives, actions and implementation structures to manage and, where appropriate, develop cultural heritage in an effective and sustainable way so that its values are retained for present and future use and appreciation. It balances and coordinates the cultural heritage needs with the needs of the 'users' of the heritage and the responsible governmental and/or private/community bodies. (World Heritage Centre, Managing Cultural World Heritage, 2013)

RESTORATION refers to a highly specialized operation. Its aim is to preserve and reveal the aesthetic and historic value of the monument and is based on respect for original material and authentic documents. It must stop at the point where conjecture begins, and in this case moreover any extra work which is indispensable must be distinct from the architectural composition and must bear a contemporary stamp. The restoration in any case must be preceded and followed by an archaeological and historical study of the monument. (INTERNATIONAL CHARTER FOR THE CONSERVATION AND RESTORATION OF MONUMENTS AND SITES - THE VENICE CHARTER 1964)

RE-USE refers to the process of reusing an old site or building for a purpose other than which it was built or designed for (Conservation Principles, English Heritage, 2008).

RUINED SITE refers to a building which, having lost substantial part of its architectural form, has ceased to function as such (John Ashurst, Conservation of ruins, 2007)

SUSTAINABLE DEVELOPMENT refers to development that meets the needs of the present without compromising the ability of future generations to meet their own needs. (Report of the World Commission on Environment and Development: Our Common Future, United Nations 1987)



OBJECTIVES

In recognizing that the project of sustainable use and re-use are part of the overall process of cultural heritage conservation and enhancement, this form seeks to establish seven cardinal principles, upon which Sustainable Use and Re-Use of Historical Ruined Sites should be based.

Principle 1: Preservation of Authenticity

Principle 2: Planning for Sustainability

Principle 3: Determining a viable new use

Principle 4: Identification of contemporary uses

Principle 5: Quality of architecture and design

Principle 6: Accessibility and visitor services

Principle 7: Maintenance and management

Following from these seven principles, the objectives of this Document are to:

- Outline a scientifically correct approach to the project of use and re-use of historical ruined sites;
- Outline the main conceptual steps that characterize a project of use and reuse of historical ruined sites;
- Address the designer towards universally consolidated and shared compositional and technical solutions;
- Provide all interested stakeholders with synthetic insights on the possible types of contemporary use of historical ruined sites.



PRINCIPLES

Principle 1: Preservation of Authenticity

A project of use and re-use of historical ruined sites must respect the basic tenets of authenticity in the spirit of the Nara Document (1994). According to this document, conservation of cultural heritage in all its forms and historical periods is rooted in the values attributed to the heritage.

1.1 A project of sustainable use and re-use of historical ruined sites should respect the cultural significance of a place. Such a use involves no, or minimal, impact on their cultural significance.

1.2 A project of sustainable use and re-use of historical ruined sites should contribute to the conservation of the authenticity of a cultural heritage site by communicating its significance without adversely impacting its cultural values or irreversibly altering its fabric.

1.3 A project of sustainable use and re-use of historical ruined sites should preserve the originality and architectural character of the building in order to not give wrong or missing information for the further generations.

1.4 A project of sustainable use and re-use of historical ruined sites should, in the modifications of the internal plan of the building, preserve the general distribution structure, typological and structural, both in its form and in the material consistency, reducing the intervention only to the modifications necessary for the new function and the new accessibility requirements.

1.5 A successful project of sustainable use and re-use of historical ruined sites adds a contemporary layer that provides value for the future and also respect and retain a building's heritage significance.

1.6 Authenticity is a concern relevant to human communities as well as material remains. The project of sustainable use and re-use of historical ruined sites should respect the traditional social functions of the site and the cultural practices and dignity of local residents and associated communities.



Principle 2: Planning for Sustainability

A project of sustainable use and re-use of historical ruined sites must respect the basic tenets of sustainability in the spirit of the ICOMOS “Declaration of Paris on Heritage as a Driver of Development”. According to this declaration cultural heritage has to play a key roles in the context of sustainable development relate to social cohesion, wellbeing, creativity, economic appeal, and promoting understanding between communities.

2.1 A project of sustainable use and re-use of historical ruined sites should be able not only to protect the building’s identity, but also to ensure a significant growth in economic and social values.

2.2 A project of sustainable use and re-use of historical ruined sites should be sensitive to their natural and cultural environment, with social, financial, and environmental sustainability among its central goals.

2.3 The community’s expectations play a strategic role in re-use strategies, in order to improve quality of life, increasing activities, infrastructure and services, with positive effects on socio-economic development. Those expectations should be investigated through participatory tools and methods.

2.4 The potential effect of the new function and visitor numbers on the cultural value, physical characteristics, integrity, and natural environment of the historical ruined site should be fully considered in heritage impact assessment studies.

2.5 The new function of the historical ruined site should aim to provide equitable and sustainable economic, social, and cultural benefits to all the involved stakeholders.

2.6 The impact of the project of reuse of historical ruined sites on the wider landscape and any ecological impacts should be considered and mitigated.



Principle 3: Determining a viable new use

Finding the most appropriate function within the context is crucial in order to preserve the cultural significance of the heritage building. It is always necessary to start from the characteristics of the ruined site, checking the cultural and physical parameters of "compatibility".

4.1 The choice of the new use must consider in the first instance the legal framework and constraints (architectural, landscape, urban, etc ...) to which the historical ruined site is subject;

4.2 In order to plan a compatible new use for a ruined site, physical and functional potentials and weaknesses of the building should be investigated;

4.3 In order to define a sustainable use and re-use of historical ruined sites, the need of the district should be investigated, through the analysis of the socio-economic and cultural offer of the territory and the assessment of the potential demand for specific services;

4.4 All relevant stakeholders that have a role in reuse decision making should be involved in the project;

4.5 The financial and economic feasibility of the reuse project should be assessed in advance, using methods such as cost-benefit analysis and decision support systems.



Principle 4: Identification of contemporary uses

The forms of use and reuse of historical ruined sites might be different according to the specific characters of buildings and contexts. Each site has its individuality and therefore requires an independent approach.

4.1 The selection of a contemporary use and re-use of historical ruined sites should explore different kind of functions: cultural, educational, commercial and residential. The presence of multiple uses can be considered, provided they are compatible with each other;

4.2 Generally, the cultural function better fits the criteria of authenticity and compatibility. In this case the ruined site can return to play a key role for the social and cultural life of the community, but also becomes a point of tourist attraction;

4.3 Types of cultural use for historical ruined sites might be: archeological park / site museum, historical, ethnographic, artistic museum, location for cultural events (temporary exhibitions, concerts, theatrical performances, historical re-enactments, tasting of local food and wine products), places for trekking / stages of cultural routes;

4.4 In the case of educational / didactic function, the historical ruined site is used for training and educational activities for schools (workshops, trips, guided tours) or universities (visit to restoration sites, training on restoration techniques);

4.5 Commercial function involves the use of spaces for commercial activities such as accommodation (hotels, bed and breakfast, etc.), catering (dinners, pic-nics, gatherings, refreshments, parties), wedding celebrations, spaces equipped to host seminars / conferences or for other commercial events. In this case, the management structure of the site sets quotas for the rental of spaces for commercial purposes;

4.6 In the case of residential use the transformation of the spaces for residential purposes generally involves a partial reconstruction of the historical ruined site and the insertion of new volumes.



Principle 5: Quality of architecture and design

The project of adaptation and transformation of historical ruined sites must be able to define a virtuous relationship between the ancient and the new building. A high-quality, architecturally-creative solution is the most appropriate approach.

5.1 The architectural project, guided by a historical-critical and aesthetic analysis, as well as by the principles of conservation, should provide solutions respectful of the values, both tangible and intangible, of places;

5.2 The restoration and re-use intervention must be distinguishable, in a discrete and controlled manner, with respect to the previous construction phases of the historical ruined site.

5.3 The restoration project must be based on the minimum intervention, ie limited to operations strictly necessary and aimed at avoiding unnecessary additions and unjustified alterations.

5.4 The restoration and reuse project must be reversible, as far as possible, fostering operations of addition rather than subtraction. All additions must have contemporary expressive relevance.

5.5 The materials used for the restoration and re-use intervention should preferably be eco-sustainable and possess physical-chemical and aesthetic requirements compatible with the existing materials, as well as being durable over time;

5.6 Plant and technological adaptation must be included in the rigorous national regulatory framework and tend to pursue the current standards of comfort and safety. Solutions that are possibly non-intrusive should be found, considering the use of modern technology too.



Principle 6: Accessibility and visitor services

Historical ruined sites, as places of memory and precious spaces for the community, must be accessible and welcoming to everyone. Accessibility is not limited to the purely physical point of view but also includes the aspects of cognition and usage.

6.1 Accessibility should be understood in a broad way as the set of spatial, distributive and organizational-management characteristics able to ensure a real use of the places and equipment by anyone;

6.2 A sustainable project of use and re-use should guarantee the territorial accessibility to the historical ruined site facilitating the achievement of the building both by public and private means of transportation. Reserved parking spaces for people with special needs should be provided;

6.3 With a careful study of the places the more easily viable routes along which to address people with special needs should be identified. Any slight differences in level should be overcome with temporary ramps, easily removable according to need;

6.2 In the framework of a project of sustainable use and re-use of historical ruined site an integrated signage project should be envisaged, in order to guide the visitor, communicating with an universal language, made of signs, pictograms and short words, helping to identify accesses and exits, the desired services and paths.

6.5 Alternative forms of access, such as improvements in intellectual access can be an acceptable, alternative option. The use of ICT for inclusiveness solution should be encouraged in order to provide some alternatives for contemporary expression and interpretation;

6.6 Evaluate the opportunity to make available to people with special needs tools such as reproductions for tactile exploration, audio guides, aids for motor difficulties.



Principle 7: Maintenance and management

Good management and maintenance are crucial to the long-term care of heritage sites, collections and assets - which means having the right skills and procedures to ensure that they are looked after. Poor management and maintenance puts heritage at risk, and can lead to higher costs in the future.

7.1 A good maintenance plan is a structured and documented set of tasks that include the activities, procedures, resources and the time scale required to carry out maintenance. It is essential that quality maintenance work, undertaken on a periodic basis after regular inspections (on a cycle of at least five to ten years) and employing traditional and compatible techniques and materials, be advised and specified

7.2 Any technical or technological elements selected to become a permanent part of the historical ruined site should be designed and constructed in a manner that will ensure effective and regular maintenance.

7.3 The assessment of the touristic carrying capacity of the historical ruined should be elaborated in order to quantify the optimal number of tourists that the historical ruined site is able to handle.

7.4 A visitor management plan should be elaborated in order to manage the supply of tourism or visitor opportunities, the demand for visitation, the resource capabilities to handle use and the impact of use on the historical ruined site;

7.5 A project of sustainable use and re-use of historical ruined sites should define a management system made up of three elements: a legal framework which defines the reasons for its existence, an institution which gives form to its organizational needs and decision-making, and resources (human, financial and intellectual) which are used to make it operative. For these purposes, a management plan of the site should be elaborated.

7.6 A safety and emergency plan should be drawn up on the basis of the risk analysis, identifies the measures and activities aimed at ensuring the safety of the assets and people present on the site and the actions to be implemented in case of emergency and the responsibilities and duties of the staff.